100

**EZ-Broker**
**Internet based solution for all phases of the structured settlement process**

- ►One time input or download of case data
- ►Can be used online or offline
- ►Diary functionality includes automatic reminders
- ►Interfaces with embedded life company software for quoting and illustration
- ►Proposal management systems allows full customization
- ►Integrated post-settlement document processing
- ►Modification of documents as permitted by life companies
- ►Save print, fax and e-mail capabilities for any documents within the software
- ►Integrated life case plans and economic loss analysis through StructureOnline partners
- ►Automatic referral of cashouts and upfront cash to designated Financial Planners
- ►Data archiving and reporting available through StructureOnline
- ►Interfaces with broker company systems

120

**EZ-Lead (EZ-Broker included)**
**Employs data mining and knowledge technology to identify structure candidates in claims systems**

- ►Electronic interface with claims systems
- ►Automatic analysis of claims to identify structure opportunities
- ►Knowledge based system proposes appropriate structure products
- ►Claims users can propose structure programs or forward referrals to brokers

130

**EZ-Reports (for Brokers)**
**Full-featured reporting module for EZ-Broker**

***Local:***

- ►Full sort and selection criteria (e.g. by life company, client-broker)
- ►Open cases
- ►Settled cases
- ►Closed cases
- ►Premium and/or commission totals
- ►Case related assignments for support staff
- ►Many more will be defined and developed as per industry need

***Remote:***

- ►Any Reports out of the Archived Data
- ►Many more will be defined and developed per industry need

Fig 1A

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**EZ-Reports (for Life Companies)**
**Full-featured reporting module for Life Company Executives**

- ►Full sort and selection criteria (e.g. by broker company, individual broker insurer)
- ►Premium and number of cases funded
- ►Cases quoted
- ►Premium by structure product
- ►Cases accepted/rejected under partnership arrangements (last right of refusal)
- ►Cash referred to financial planners
- ►Many more will be defined and developed as per industry need

150

**EZ-Updates**
**Internet-based support for delivery of life company software, updates and rate changes**

- ►All functions are provided through the StructureOnline portal
- ►Download of life company software by authorized parties
- ►Distribution of software upgrades and patches
- ►Distribution of rate changes
- ►Automatic notification of updates to EZ-Broker users

## StructureOnline Services

160

**EZ-Sync**
**Allows full-use of StructureOnline's broker services by broker companies, individual brokers and support staff**

- ►Allows brokers to download portable version of EZ-Broker for use offline
- ►Brokers and support staff can synchronize their work, data, schedule, diary cases, etc.
- ►Software updates are executed automatically
- ►Rate changes are made automatically

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**EZ-Support**
**StructureOnline help desk for life companies and brokers**

- ►Technical support for life company software
- ►Support for life products
- ►Maintain latest life company software on the web for download
- ►Maintain latest software patch for life company, software on the web for download
- ►Maintain rate changes on the web as publication
- ►Other services based on user demand

180

**Alternative Dispute Resolution Provider Affiliation**
**Brings a new source of cases to the structure industry**

- ►Custom templates for ADR web pages
- ►Allows structured settlements to be offered as part of the ADR process
- ►Structure products from participating life companies offered through StructureOnline
- ►Referral of cases to participating brokers facilitated by StructureOnline

Fig. 1B

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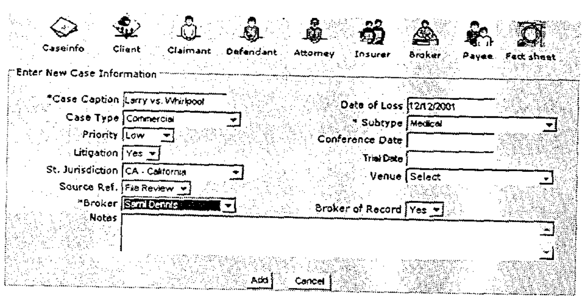
**Online Broker (Web version of EZ-Broker)**
**Allows easy access to structure products to qualifying professionals, generates new structure business**

- ►Service offered to qualified parties via the Internet
- ►StructureOnline facilitates company approval and licensing issues

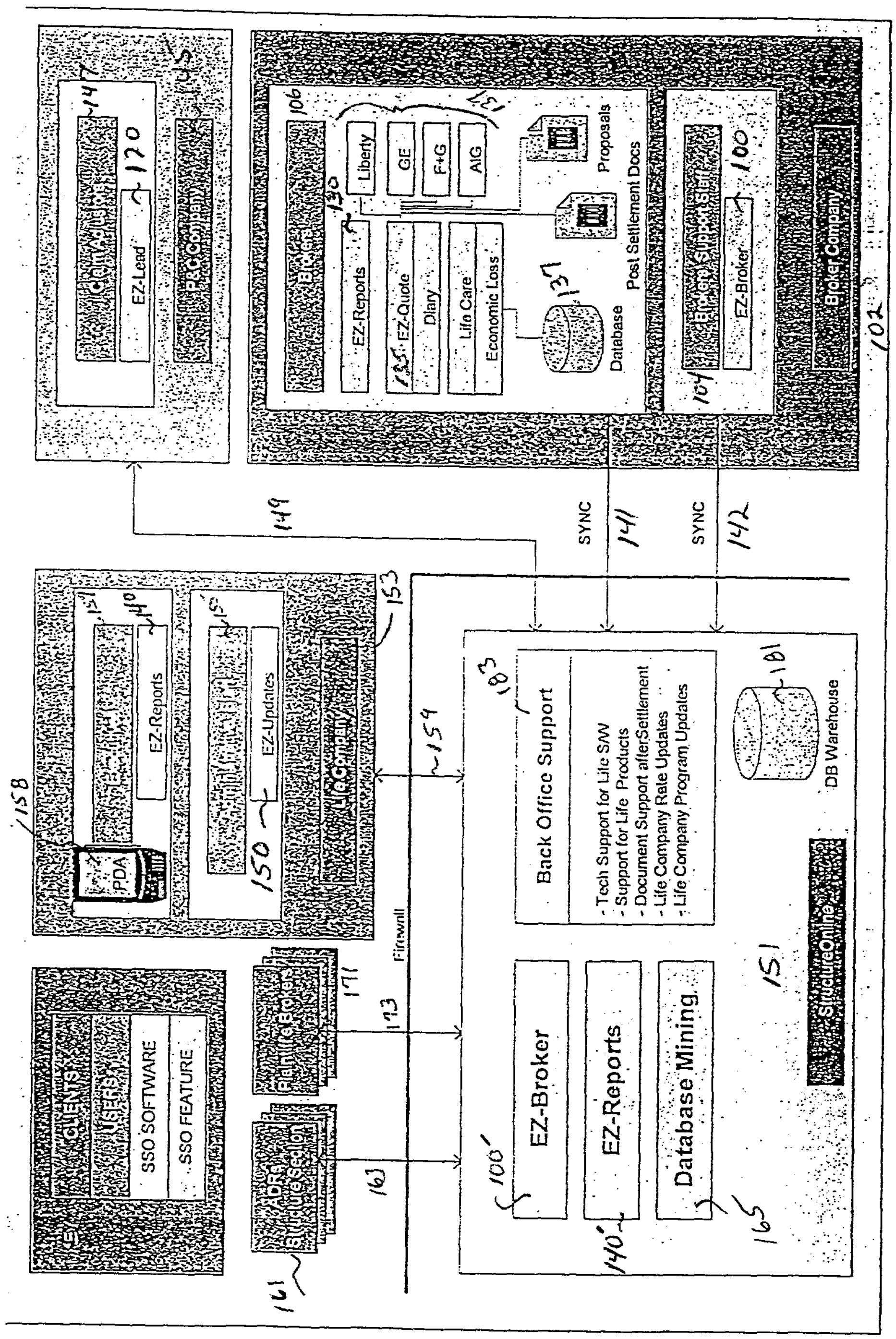
FIG. 1C

**Creating a New Case**




- **Mandatory Field Requirements for opening a case**
  - **Case Caption**
  - **Broker and Broker of Record**

FIG 3


EZ-Lead
Broker
EZ-Reports
EZ-Quote
Diary
Life Care
Economic Loss
Liberty
GE
F+G
AIG
Proposals
Post Settlement Docs
Database
EZ-Broker
Broker Company
SYNC
SYNC
PDA
EZ-Reports
EZ-Updates
CLIENTS
USERS
SSO SOFTWARE
SSO FEATURE
Firewall
EZ-Broker
EZ-Reports
Database Mining
Back Office Support
- Tech Support for Life S/W
- Support for Life Products
- Document Support afterSettlement
- Life Company Rate Updates
- Life Company Program Updates
DB Warehouse
StructureOnline
100
102
104
106
120
130
135
137
140
141
142
147
149
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151
153
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161
163
165
171
173
181
183

FIG. 2

## Creating a New Case (continued)

- **Add / Edit Insurer Client Information from Client Tab**
- **National Account Check Box for narrowing your search**
- **Mandatory fields for Insurer**
  - **Insurer Company Name**
  - **Date of Case Receipt**

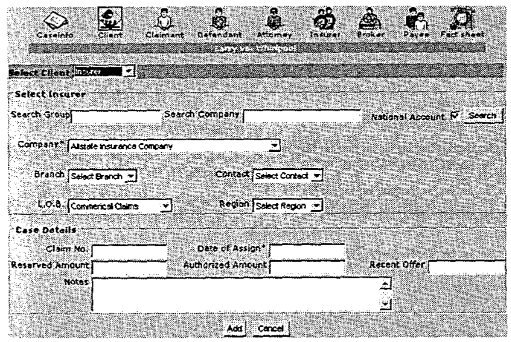
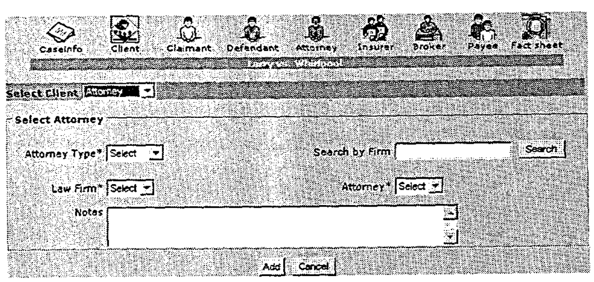



FIG 4

## Creating a New Case (continued)

- **Add / Edit Law Firm Client Information from Client Tab**

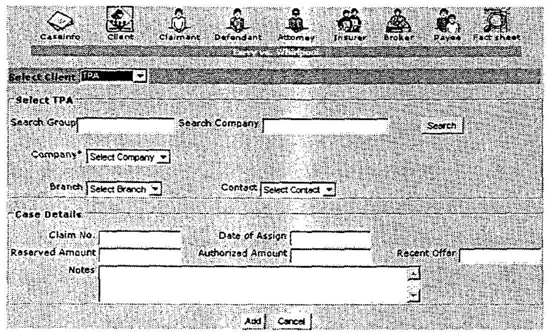



- **Mandatory fields for Law Firm**
  - **Attorney Type**
  - **Law Firm Name**
  - **Attorney Name**

FIG 5

**Creating a New Case (continued)**

- **Add / Edit TPA Client Information from Client Tab**

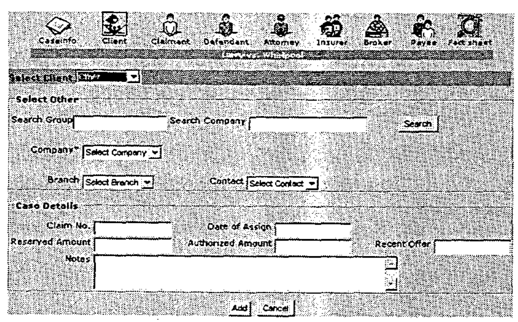



- **Mandatory fields for TPA**
  - **TPA Company Name**

FIG 6

**Creating a New Case (continued)**

- **Add / Edit Other Client Information from Client Tab**




- **Mandatory fields for Other Client**
  - **Other Company Name**

FIG 7

**Creating a New Case (continued)**

- **Add / Edit Claimant Information from Claimant Tab**

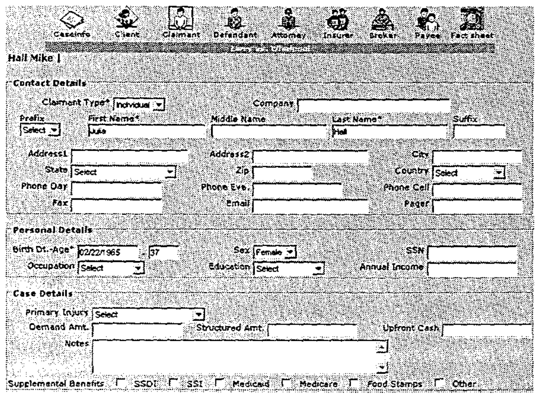
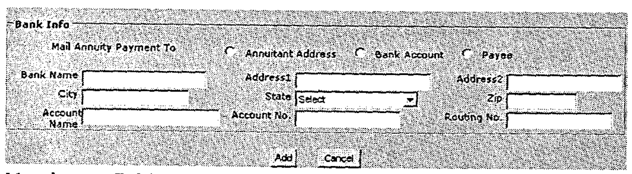



FIG 8

**Creating a New Case (continued)**



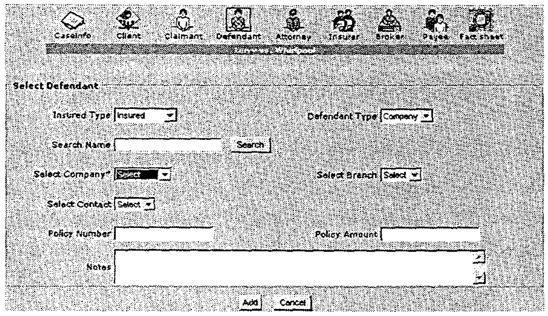

- **Mandatory fields for Claimant**
  - **First Name and Last Name**
  - **Date of Birth and Age**

- **Contact Details**
- **Personal Details**
- **Case Details**
- **Bank Information**

FIG 9

## Creating a New Case (continued)

- **Add / Edit Insured Defendant Company Information from Defendant Tab**

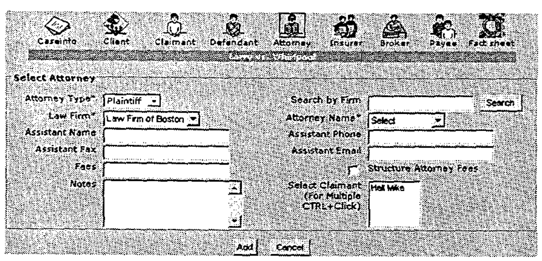



- **Mandatory fields for Insured Defendant**
  - **Company Name**

FIG 10

## Creating a New Case (continued)

- **Add / Edit Plaintiff Attorney Information from Attorney Tab**

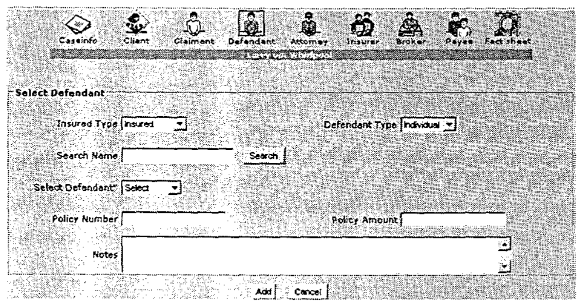



- **Mandatory fields for Plaintiff Attorney**
  - **Attorney Type**
  - **Law Firm**
  - **Attorney Name**

FIG 13

**Creating a New Case (continued)**

- **Add / Edit Insured Defendant Individual Information from Defendant Tab**




- **Mandatory fields for Individual Insured Defendant**
  - **Defendant Type**

FIG 11

**Creating a New Case (continued)**

- **Add / Edit Self Insured Defendant Information from Defendant Tab**
- **Mandatory fields for Self Insured Defendant**
  - **Company name**

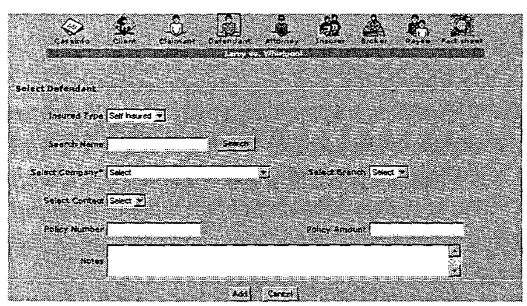
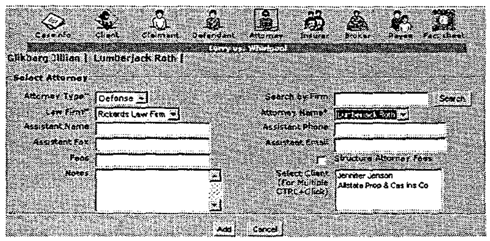



FIG 12

**Creating a New Case (continued)**

- **Add / Edit Defense Attorney Information from Attorney Tab**

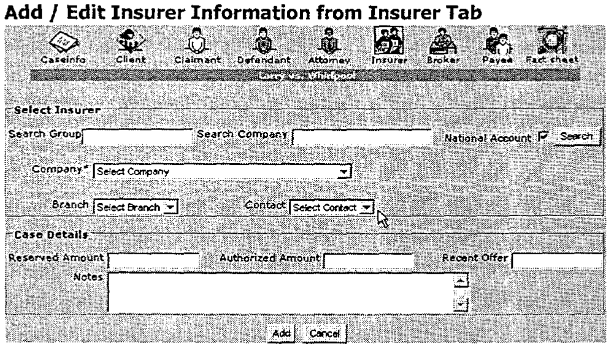


- **Mandatory fields for Defense Attorney**
  - **Attorney Type**
  - **Law Firm**
  - **Attorney Name**

FIG 14

**Creating a New Case (continued)**

- **Add / Edit Insurer Information from Insurer Tab**

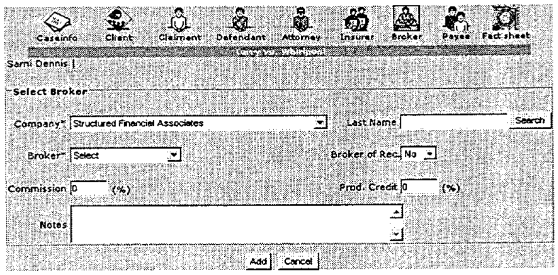



- **Mandatory fields for Insurer**
  - **Company Name**

FIG 15

## Creating a New Case (continued)

- Add / Edit Broker Information from Broker Tab




- Mandatory fields for Broker
  - Broker Company Name
  - Broker Name

FIG 16

## Creating a New Case (continued)

- Add / Edit Payee Information from Payee Tab
- Mandatory Fields
  - First Name
  - Last Name

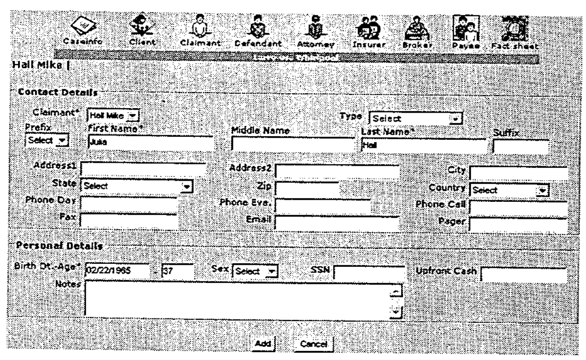
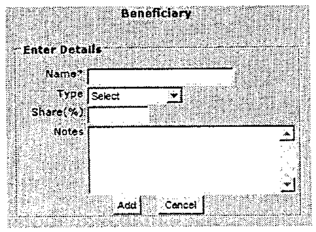



FIG 17

## Creating a New Case (continued)

- **Add / Edit Beneficiary Information from Payee Tab**




- **Mandatory Fields**
  - **Name**

FIG 18

## Managing your Diary

- **Types of Companies**
  - **Assignment Company**
  - **Broker Company**
  - **Insured Defendant**
  - **Insurance Company**
  - **Law Firm**
  - **Life Company**
  - **Other**
  - **Self Insured Defendant**
  - **TPA**

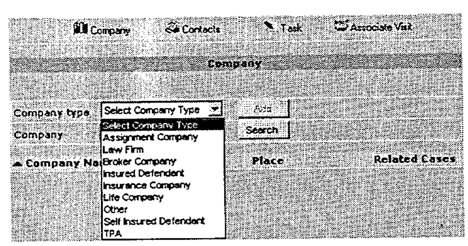



FIG 19

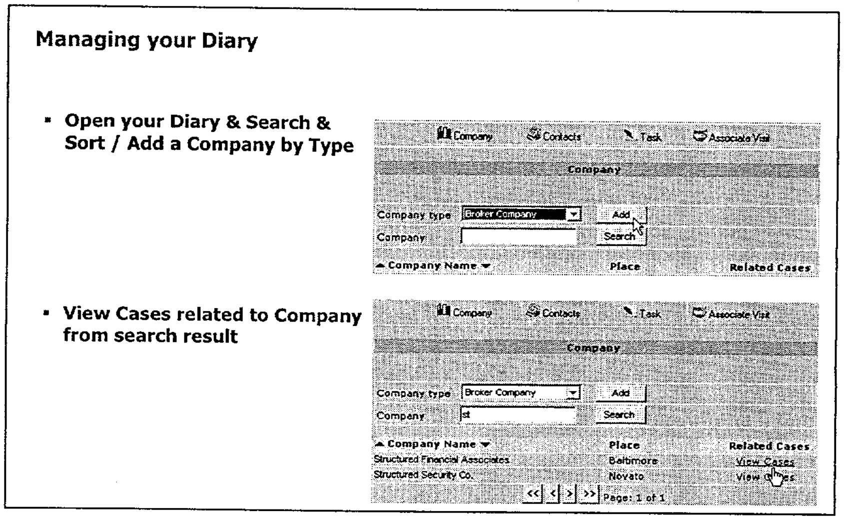

Managing your Diary
Open your Diary & Search & Sort / Add a Company by Type
Company
Contacts
Task
Associate Visit
Company
Company type
Broker Company
Add
Company
Search
Company Name
Place
Related Cases
View Cases related to Company from search result
Structured Financial Associates
Baltimore
View Cases
Structured Security Co.
Novato
Page: 1 of 1

FIG 20

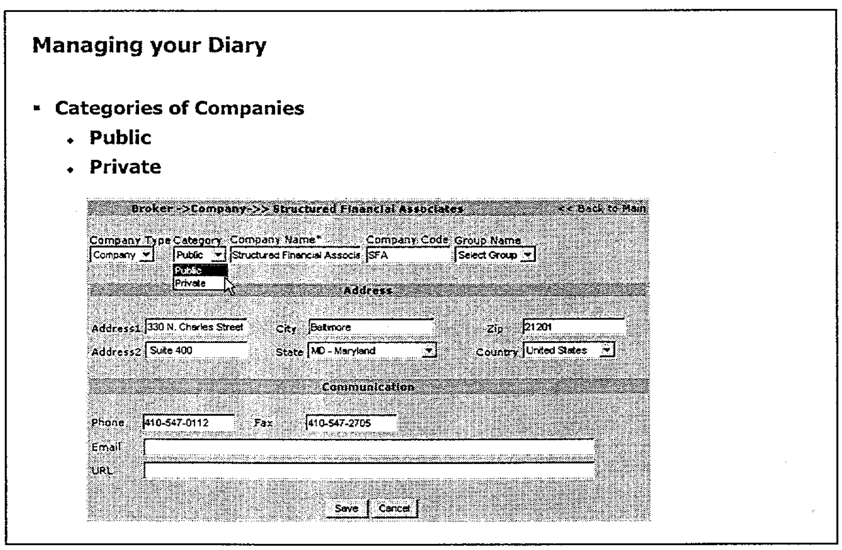

Managing your Diary
Categories of Companies
Public
Private
Broker ->Company->> Structured Financial Associates
<< Back to Main
Company Type
Category
Company Name*
Company Code
Group Name
Company
Public
Structured Financial Associa
SFA
Select Group
Private
Address
Address1
330 N. Charles Street
City
Baltimore
Zip
21201
Address2
Suite 400
State
MD - Maryland
Country
United States
Communication
Phone
410-547-0112
Fax
410-547-2705
Email
URL
Save
Cancel

FIG 21

## Managing your Diary (continued)

- **Contact Listing at each Level**

Branch List  Add New Branch  Contact List  Add New Contact

| Name | Phone | Address |
|---|---|---|
| Angel Viera | 323-889-3837 | 500 Citadel Drive2nd Floor City of Commerce , Commerce ,CA - California -90040 |
| Carole Carlson | 806-674-8367 | 302 W. Main StreetSuite 103 , Avon ,CT - Connecticut -06001 |
| Chuck Berry | 918-461-2084 | 7341 East 75TH Street , Tulsa ,OK - Oklahoma - 74133-2816 |
| Edward Whalen | 810-733-7315 | 2503 S. Linden Road , Flint ,MI - Michigan -48532 |
| Jacqueline Viola | 636-938-1249 | 607 Vista Hills Court , Eureka ,MO - Missouri - 63025 |
| John Stanford Jr. | 770-951-0696 | 6445 Powers Ferry Road#195 , Atlanta ,GA - Georgia -30339 |
| Joseph Long | 215-348-7244 | 350 S. Main StreetSuite 209 , Doylestown ,PA - Pennsylvania -18901 |

FIG 22

## Managing your Diary (continued)

- **Remember to use <Type = Company>, if desired to show under Drop Down List**

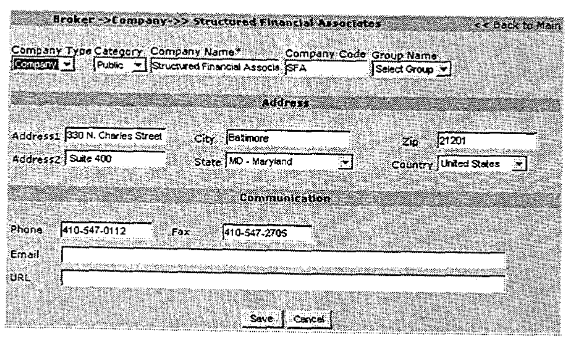



FIG 23

## Managing your Diary (continued)

- **Search Contact by First Name, Last Name and/or Type**

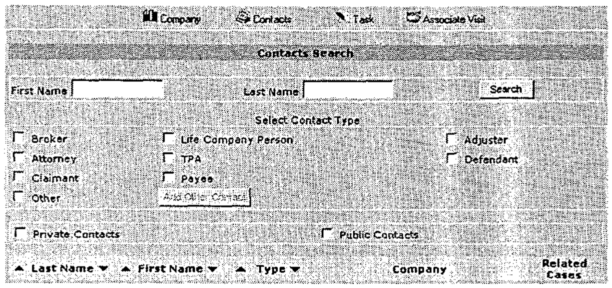
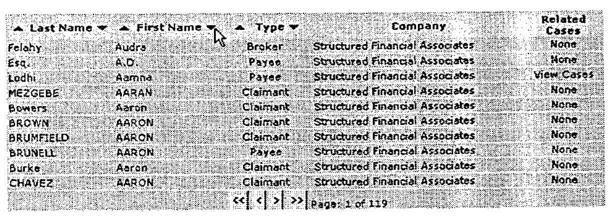



FIG 24

## Managing your Diary (continued)

- **Sort searched contacts using arrows**



| Last Name | First Name | Type | Company | Related Cases |
|---|---|---|---|---|
| Felahy | Audra | Broker | Structured Financial Associates | None |
| Esq. | A.D. | Payee | Structured Financial Associates | None |
| Lodhi | Aamna | Payee | Structured Financial Associates | View Cases |
| MEZGEBE | AARAN | Claimant | Structured Financial Associates | None |
| Bowers | Aaron | Claimant | Structured Financial Associates | None |
| BROWN | AARON | Claimant | Structured Financial Associates | None |
| BRUMFIELD | AARON | Claimant | Structured Financial Associates | None |
| BRUNELL | AARON | Payee | Structured Financial Associates | None |
| Burke | Aaron | Claimant | Structured Financial Associates | None |
| CHAVEZ | AARON | Claimant | Structured Financial Associates | None |

<< < > >> Page: 1 of 119

FIG 25

## Managing your Diary (continued)

- View cases related to Contact from search result

| Last Name | First Name | Type | Company | Related Cases |
|---|---|---|---|---|
| Wallmann | Achim | Broker | Diversified Settlements, Inc. | None |
| Swebson | Alan | Broker | Structured Security Co. | None |
| Frisbee | Alice | Broker | Structured Security Co. | View Cases |
| Cooper | Alice | Broker | Brant Hickey & Associates | None |
| Hull | Allan | Broker | Structured Security Co. | None |
| Richardson | Allan | Broker | The Alliance Settlement Cos. | None |
| Paul | Amy | Broker | Summit Settlement Services | None |
| Fisher | Andrew | Broker | Settlement Options | None |
| Hull | Andrew | Broker | Settlement Associates & Insurance Services, Inc. | None |
| Viera | Angel | Broker | American Settlement Corp. | None |

<< < > >> Page: 1 of 2

- Contact Category
  - Public
  - Private

FIG 26

## Managing your Diary (continued)

- Check Box for
  - Case Coordinator in Life Company
  - Broker in Broker Company
  - Attorney in Law Firm
  - Claim Adjuster in Insurer / TPA
  - Primary Contact in All Contacts

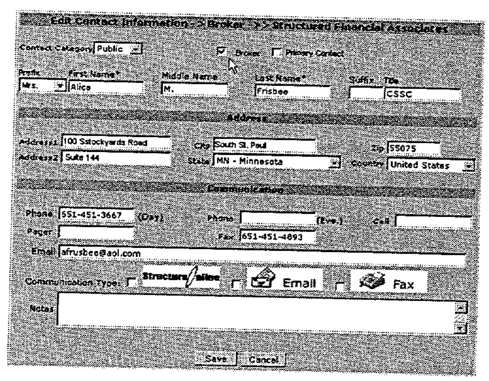



FIG 27

**Managing your Diary (continued)**

- **Communication Type Check Box**
  - **StructureOnline Exchange**
  - **Fax**
  - **Email**

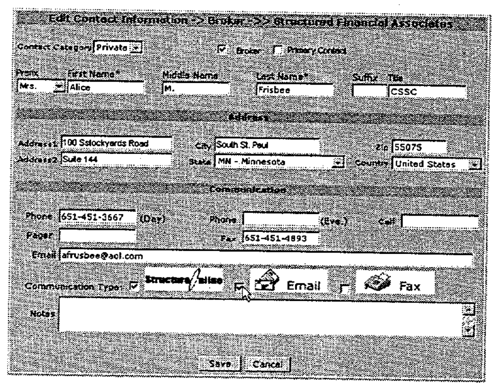



FIG 28

**Managing your Diary (continued)**

- **Tasks – Open, Close, Details, Calendar**

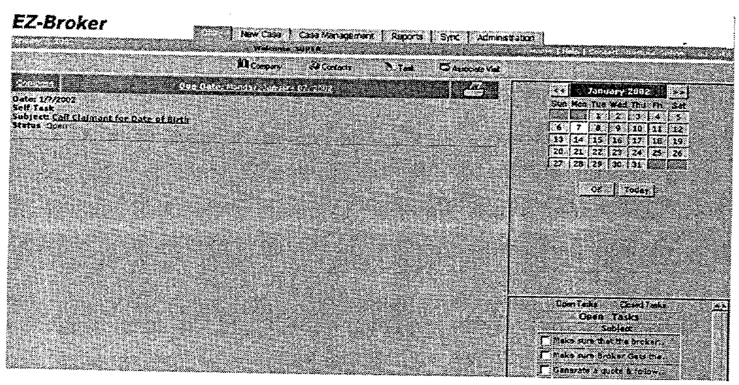



FIG 29

**Managing your Diary (continued)**

- **Composing Non-case related task**
  - **From Home Page -> Compose**
  - **From Diary -> Task -> Compose**

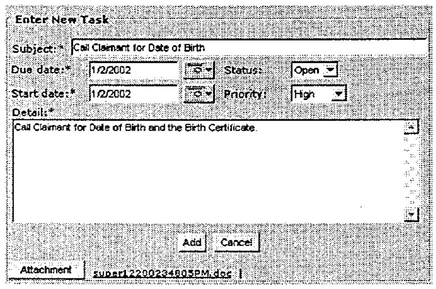



FIG 30

**Managing your Diary (continued)**

- **Tracking visits to Clients (National Accounts only)**
  - **Name of the Insurance Company / Branch**
  - **Date of the Last Visit**
  - **Purpose**
  - **Next visit schedule**
  - **Cases Received**
  - **Notes**

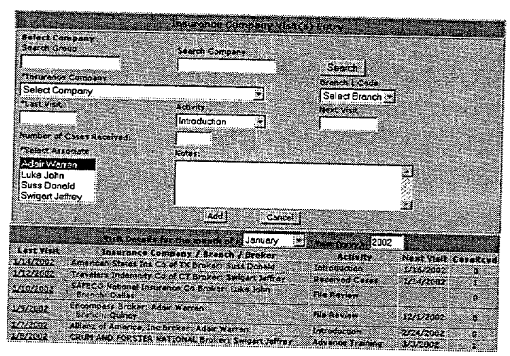



FIG 31

## Searching for an existing Case (continued)

- From Home Page
  - Most recently worked on 10 cases

Structured Settlement Case Monitoring

| File No. | Caption | Date of Loss | Status |
|---|---|---|---|
| SFAsuper1219200133827AM | Paul Vs. Manor Care | 12/10/1998 | LEAD ACCEPTED |
| SFAsuper1219200133459AM | Ann Vs. Lowes | 8/9/2000 | LEAD ACCEPTED |
| SFAmaryb1217200181403PM | Shirley Vs. UPS | 10/12/1999 | LEAD ACCEPTED |
| SFAsuper1219200133551AM | Sarah Vs. Timberline Inc. | 12/10/2001 | LEAD ACCEPTED |
| SFAsuper1219200133248AM | Chris Vs. Oracle Corp. | 4/9/1998 | LEAD ACCEPTED |
| SFAsuper1218200191943AM | Larry Vs. Hands & Associates | 5/7/2001 | LEAD ACCEPTED |
| SFAsuper1212200111904AM | Tomothy Vs United Airlines | 11/10/2000 | LEAD ACCEPTED |
| SFAsuper12172001103120PM | Chris Vs. General Electric | 3/8/2001 | LEAD ACCEPTED |
| SFAsuper1219200150235AM | Larry vs. Whirlpool | 10/12/2001 | LEAD ACCEPTED |
| SFAsuper1217200144137PM | Charlie vs EMC | 4/5/1999 | LEAD ACCEPTED |

** Click here for more...

  - Based on Past Due Tasks

Past Due Tasks

| Date | Case | Subject | Priority |
|---|---|---|---|
| 11/10/2001 12:55:00 PM | UHALT, CHARLES | Quote Followup - uhalt1 | |
| 11/10/2001 12:40:00 PM | UHALT, CHARLES | Quote Followup - uhalt | |
| 11/08/2001 2:23:00 PM | FUENTES, ALEX | Quote Followup - fuentes | |
| 11/08/2001 2:21:00 PM | FUENTES, ALEX | Quote Followup - fuentes | |
| 10/31/2001 | GRABER, MICHELLE | test | |
| 10/26/2001 3:06:00 PM | PEACE, SHEILA* | Quote Followup - sheela | |
| 10/24/2001 5:06:00 PM | YAMADA, KERRY | Quote Followup - kerry | |

FIG 32

## Searching for an existing Case (continued)

- From Case Management
  - Multiple Search Criterion

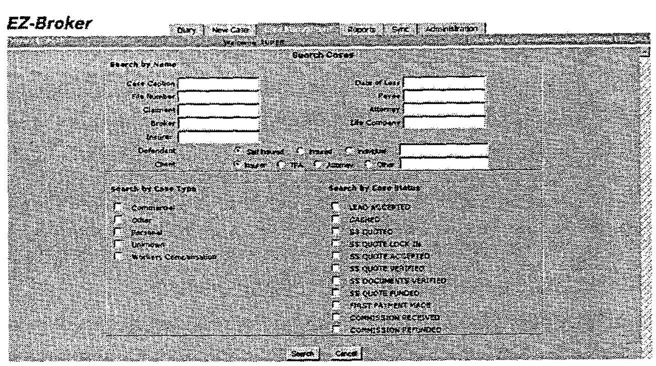



FIG 33

**Searching for an existing Case (continued)**

- **From Diary**
  - **Based on Company of any Type**

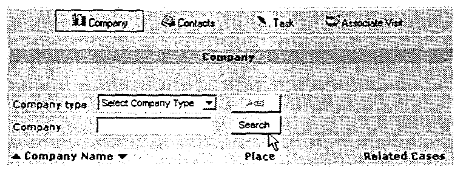



FIG 34

**Searching for an existing Case (continued)**

- **From Diary**
  - **Based on Contact Person of any Type**

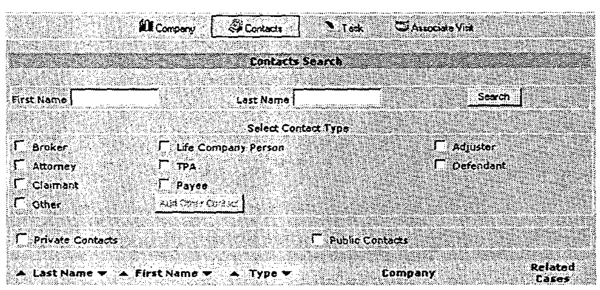



FIG 35

**Generating a Quote for Fully Integrated Life Company (continued)**

- **Select Claimant & Life Company; Click "Enter Quote Data"**

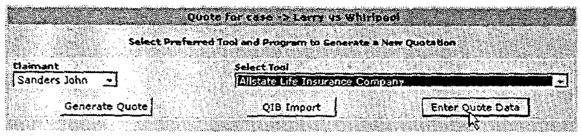



FIG 36

**Generating a Quote for Fully Integrated Life Company (continued)**

- **Select the Rate Series; Save the Quote**

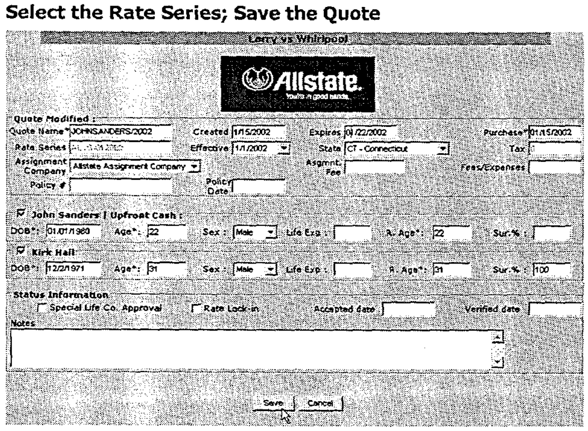



FIG 37

**Generating a Quote for Fully Integrated Life Company (continued)**

- **Start adding benefits & click "Calculate"; Save at the end**

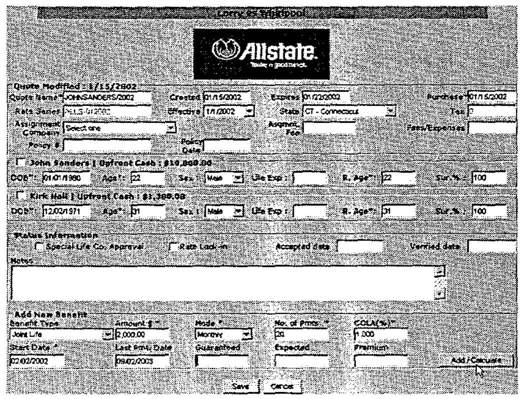



FIG 38

**Generating a Quote for Partially Integrated Life Company (continued)**

- **Select Claimant & Life Company; Click "Generate Quote"**

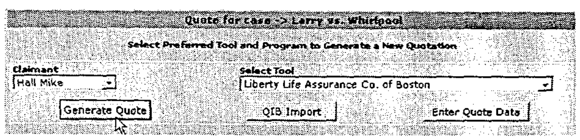



FIG 39

**Generating a Quote for Partially Integrated Life Company (continued)**

- **QIB Tool is opened now; Click File -> Import; Select file C:\QIBImpExp\filename.exp**

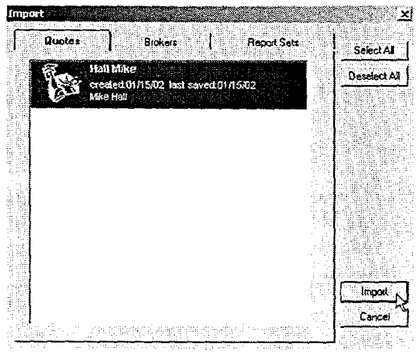



FIG 40

**Generating a Quote for Partially Integrated Life Company (continued)**

- **Quote data has been Imported now; Click File -> Open Quote -> Edit**

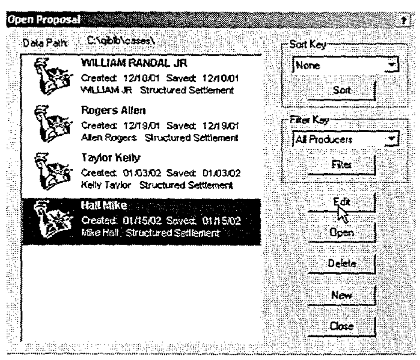
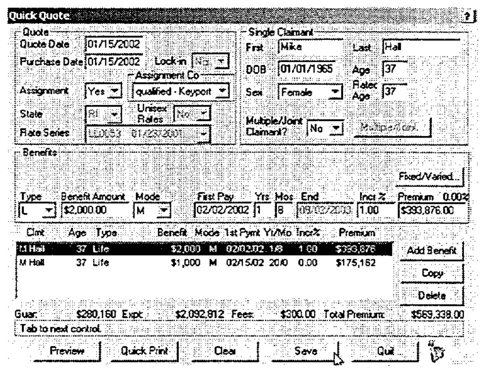



FIG 41

**Generating a Quote for Partially Integrated Life Company (continued)**

- Check all imported information from Quote Specification or Quick Quote window.
- Start adding benefit information -> Add Benefit
- Quote String Carryover between Tools (Change mode if not mentioned)
- Save -> Quote Name ->Ok



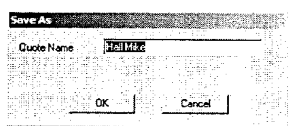




FIG 42

**Generating a Quote for Partially Integrated Life Company (continued)**

- To Export Quote Data; File-> Export
- Select file C:\QIBImpExp\claimantname.exp -> Click on Save

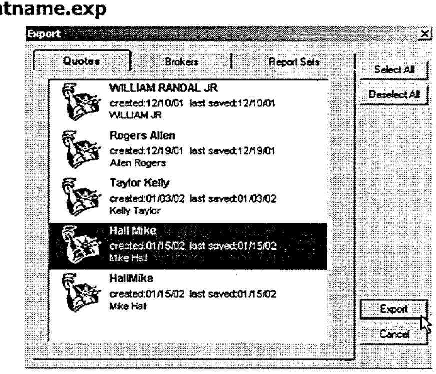
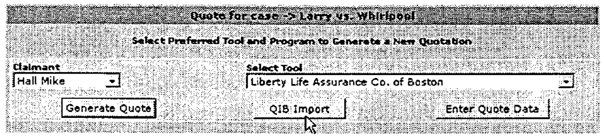



FIG 43

**Generating a Quote for Partially Integrated Life Company (continued)**

- **Click on QIB Import**




- **Click on Browse and select the file to Import; Click on Import -> Close**

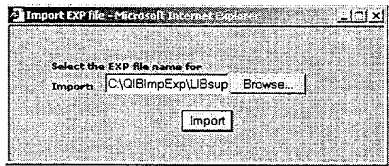
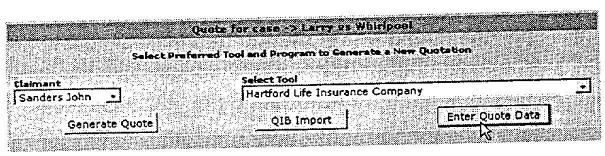



FIG 44

**Generating a Quote for not Integrated Life Company (continued)**

- **Select Claimant & Life Company; Click "Enter Quote Data"**




- **Copy / Paste the data from Life Company Tool manually (Unfortunately)**

FIG 45

## Generating a Quote for not Integrated Life Company (continued)

- Select the Rate Series; Save the Quote
- Start adding benefits & click "Calculate"; Save at the end

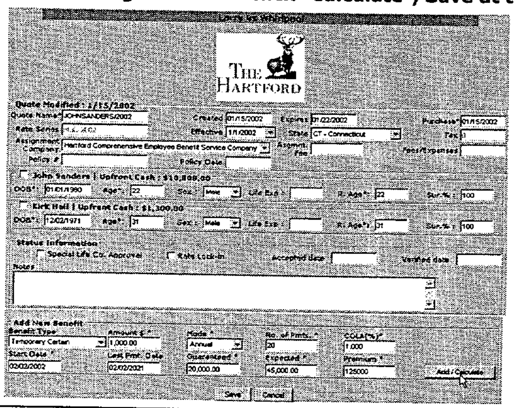



FIG 46

## Proposal - Documents (continued)

- Select the Quote & Appropriate Proposal Template; Click "Generate Proposal"

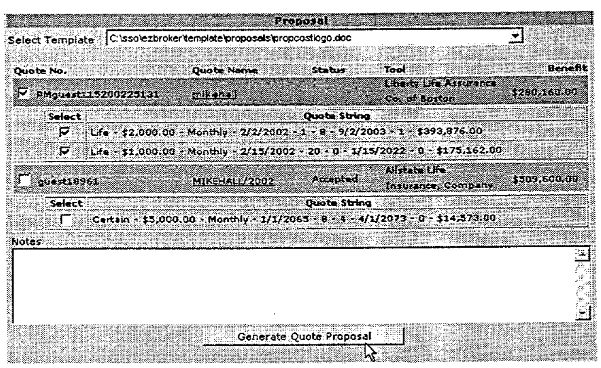



FIG 47

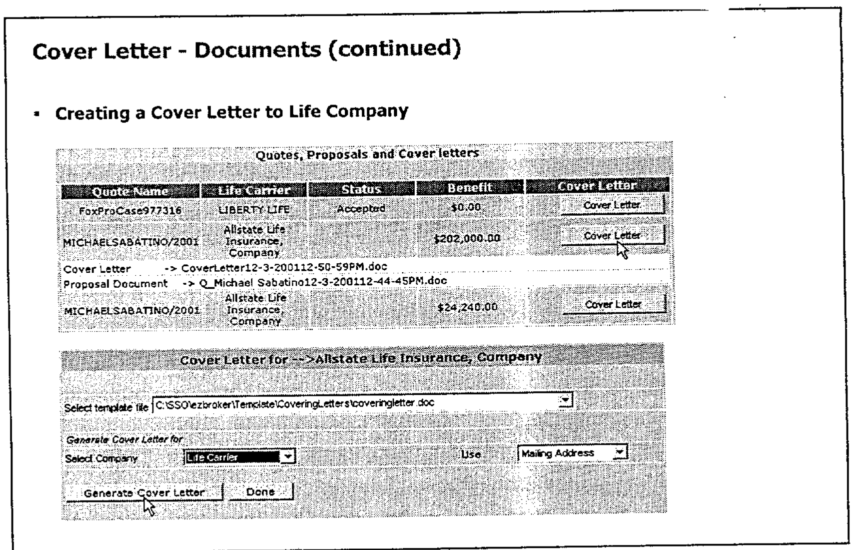

Cover Letter - Documents (continued)
Creating a Cover Letter to Life Company
Quotes, Proposals and Cover letters
Quote Name
Life Carrier
Status
Benefit
Cover Letter
FoxProCase977316
LIBERTY LIFE
Accepted
$0.00
Cover Letter
MICHAELSABATINO/2001
Allstate Life Insurance, Company
$202,000.00
Cover Letter
Cover Letter -> CoverLetter12-3-200112-50-59PM.doc
Proposal Document -> Q_Michael Sabatino12-3-200112-44-45PM.doc
MICHAELSABATINO/2001
Allstate Life Insurance, Company
$24,240.00
Cover Letter
Cover Letter for -->Allstate Life Insurance, Company
Select template file
Generate Cover Letter for
Select Company
Life Carrier
Use
Mailing Address
Generate Cover Letter
Done

FIG. 48

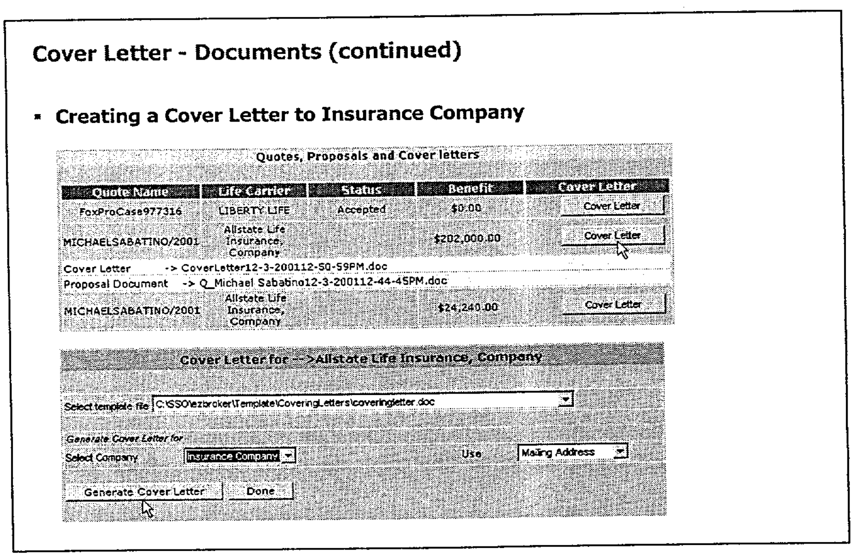

Cover Letter - Documents (continued)
Creating a Cover Letter to Insurance Company
Quotes, Proposals and Cover letters
Quote Name
Life Carrier
Status
Benefit
Cover Letter
FoxProCase977316
LIBERTY LIFE
Accepted
$0.00
Cover Letter
MICHAELSABATINO/2001
Allstate Life Insurance, Company
$202,000.00
Cover Letter
Cover Letter -> CoverLetter12-3-200112-50-59PM.doc
Proposal Document -> Q_Michael Sabatino12-3-200112-44-45PM.doc
MICHAELSABATINO/2001
Allstate Life Insurance, Company
$24,240.00
Cover Letter
Cover Letter for -->Allstate Life Insurance, Company
Select template file
Generate Cover Letter for
Select Company
Insurance Company
Use
Mailing Address
Generate Cover Letter
Done

FIG 49

## Post Settlement Document - Documents (continued)

- **Creating a Post-Settlement Document from Template**

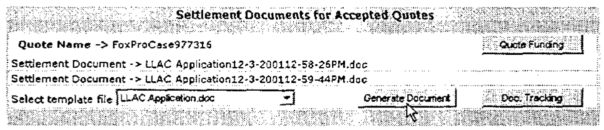



FIG 50

## Document Attachment - Documents (continued)

- **Attaching a Document for e-filing**
  - **Any Scanned Data Files**
  - **Any Electronically Generated Documents (Word, Excel, etc.)**

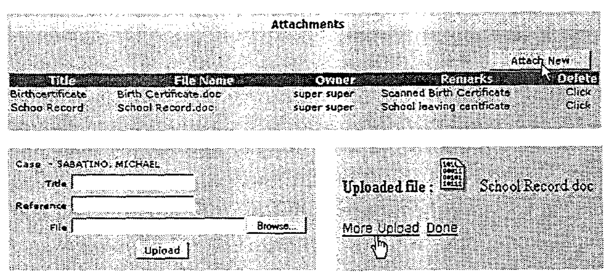



FIG 51

## Quote Acceptance Update to Case

- Click on the Quote to view details
- Enter the Date in Quote Accepted Field;
- Don't forget to Save

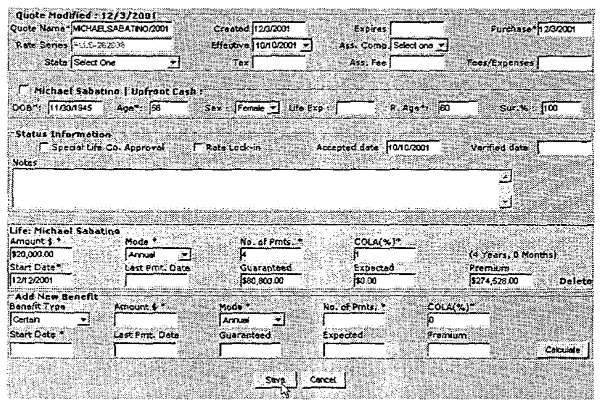



FIG 52

## Quote Verification Update to Case

- HOCA verifies an accepted Quote
  - Current Rate Series
    - Exception of Special Approval of Life Company
  - Underwriting Guidelines
  - One more rule

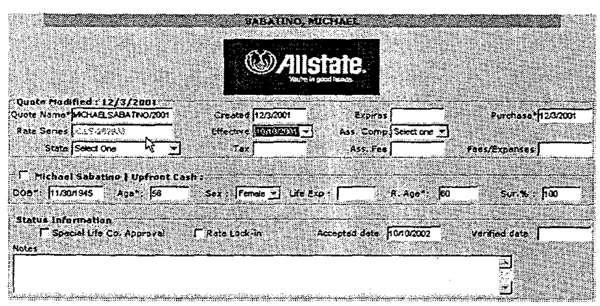
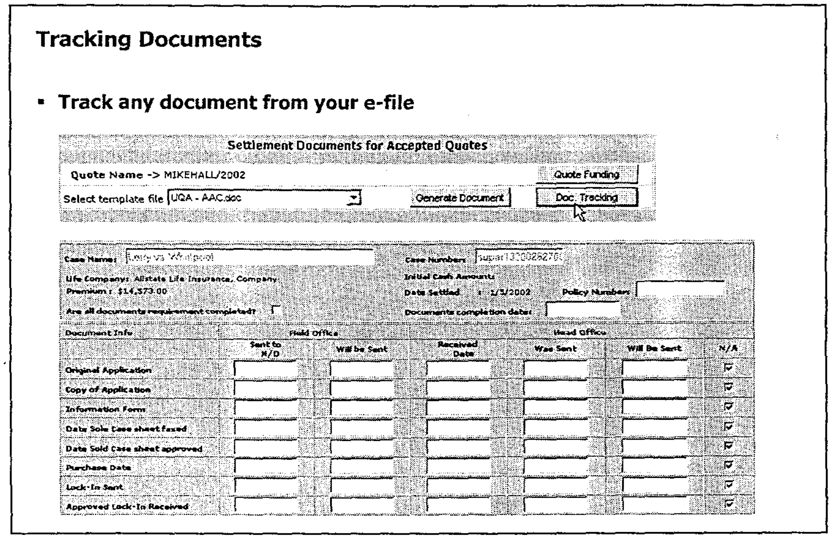
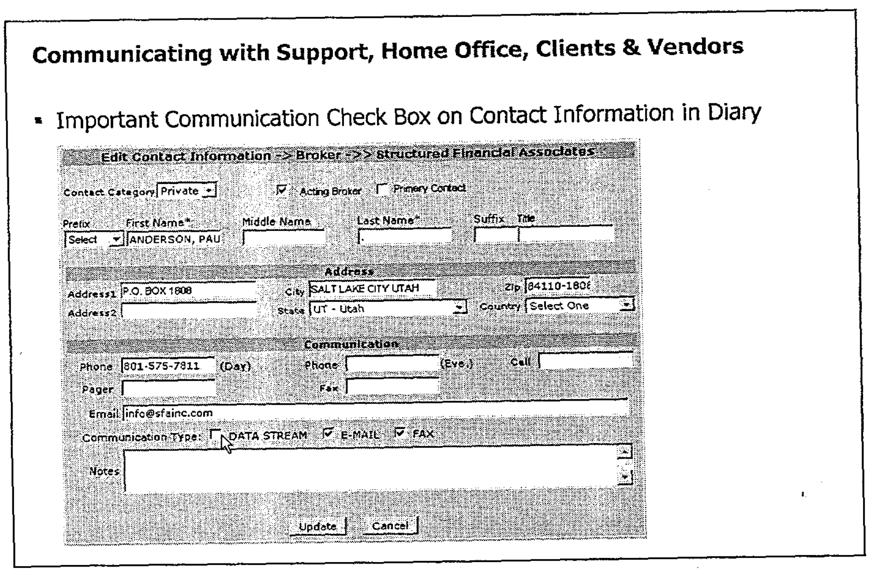



FIG 53


Tracking Documents
▪ Track any document from your e-file
Settlement Documents for Accepted Quotes
Quote Name -> MIKEHALL/2002
Quote Funding
Select template file
UQA - AAC.doc
Generate Document
Doc. Tracking
Case Name:
Case Number:
Life Company: Allstate Life Insurance, Company
Initial Cash Amount:
Premium: $14,373.00
Date Settled
1/3/2002
Policy Number:
Are all documents requirement completed?
Documents completion date:
Document Info
Field Office
Head Office
Sent to N/D
Will be Sent
Received Date
Was Sent
Will Be Sent
N/A
Original Application
Copy of Application
Information Form
Date Sold Case sheet faxed
Date Sold Case sheet approved
Purchase Date
Lock-In Sent
Approved Lock-In Received

F I G 54


Communicating with Support, Home Office, Clients & Vendors
▪ Important Communication Check Box on Contact Information in Diary
Edit Contact Information -> Broker ->> Structured Financial Associates
Contact Category
Private
Acting Broker
Primary Contact
Prefix
First Name*
Middle Name
Last Name*
Suffix
Title
Select
ANDERSON, PAU
Address
Address1
P.O. BOX 1808
City
SALT LAKE CITY UTAH
Zip
84110-1808
Address2
State
UT - Utah
Country
Select One
Communication
Phone
801-575-7811
(Day)
Phone
(Eve.)
Cell
Pager
Fax
Email
info@sfainc.com
Communication Type:
DATA STREAM
E-MAIL
FAX
Notes
Update
Cancel

F I G 55

## Generating Reports

- Go to Reports Tab to Generate following Reports
  - 1. Associates Reports
  - 2. Carrier Reports
  - 3. Defendant Reports
  - 4. Outstanding Reports
  - 5. Insurance Company Reports
  - 6. Custom Reports

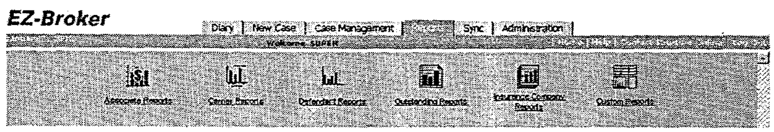



FIG 56

## Generating Reports

- Standard Report generating Format (Super User or Executive)

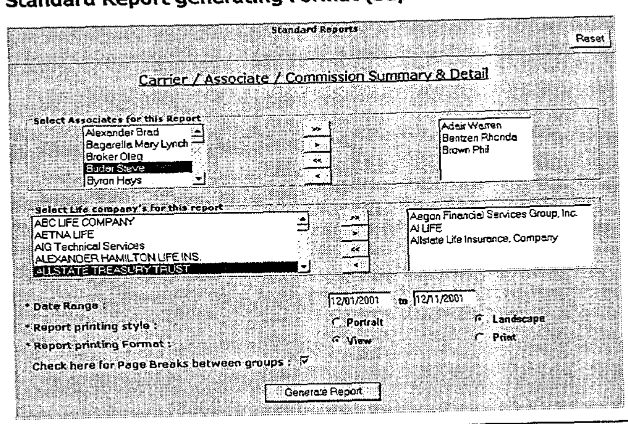



FIG 57

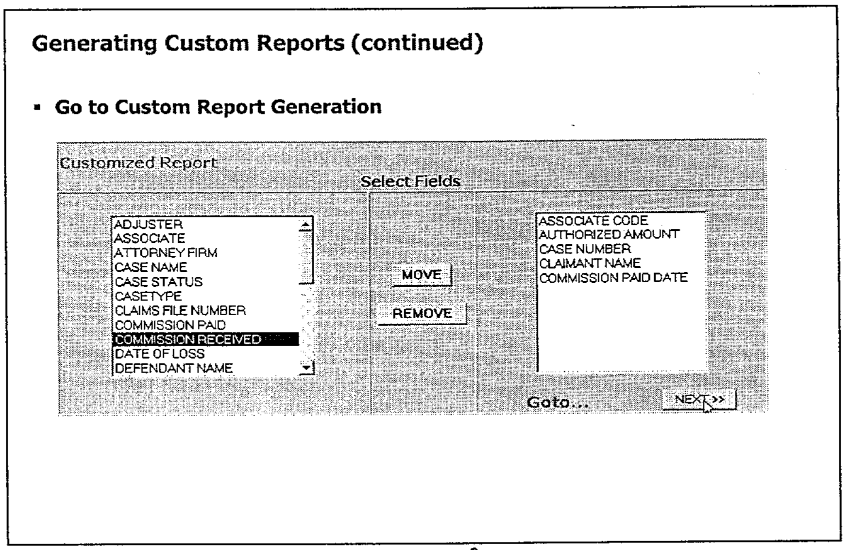

Generating Custom Reports (continued)
Go to Custom Report Generation
Customized Report
Select Fields
ADJUSTER
ASSOCIATE
ATTORNEY FIRM
CASE NAME
CASE STATUS
CASETYPE
CLAIMS FILE NUMBER
COMMISSION PAID
COMMISSION RECEIVED
DATE OF LOSS
DEFENDANT NAME
MOVE
REMOVE
ASSOCIATE CODE
AUTHORIZED AMOUNT
CASE NUMBER
CLAIMANT NAME
COMMISSION PAID DATE
Goto...
NEXT >>

FIG 59

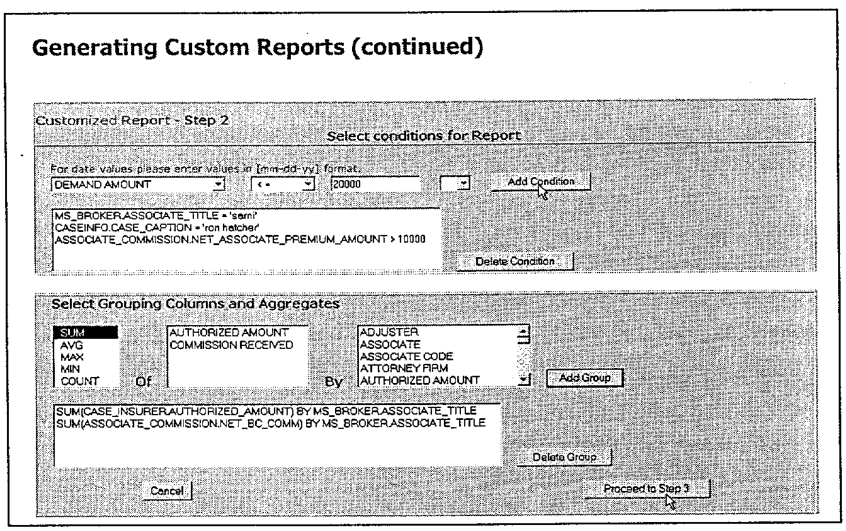

Generating Custom Reports (continued)
Customized Report - Step 2
Select conditions for Report
For date values please enter values in [mm-dd-yy] format.
DEMAND AMOUNT
<=
20000
Add Condition
MS_BROKER.ASSOCIATE_TITLE = 'sami'
CASEINFO.CASE_CAPTION = 'ron hatcher'
ASSOCIATE_COMMISSION.NET_ASSOCIATE_PREMIUM_AMOUNT > 10000
Delete Condition
Select Grouping Columns and Aggregates
SUM
AVG
MAX
MIN
COUNT
Of
AUTHORIZED AMOUNT
COMMISSION RECEIVED
By
ADJUSTER
ASSOCIATE
ASSOCIATE CODE
ATTORNEY FIRM
AUTHORIZED AMOUNT
Add Group
SUM(CASE_INSURER.AUTHORIZED_AMOUNT) BY MS_BROKER.ASSOCIATE_TITLE
SUM(ASSOCIATE_COMMISSION.NET_BC_COMM) BY MS_BROKER.ASSOCIATE_TITLE
Delete Group
Cancel
Proceed to Step 3

FIG 60

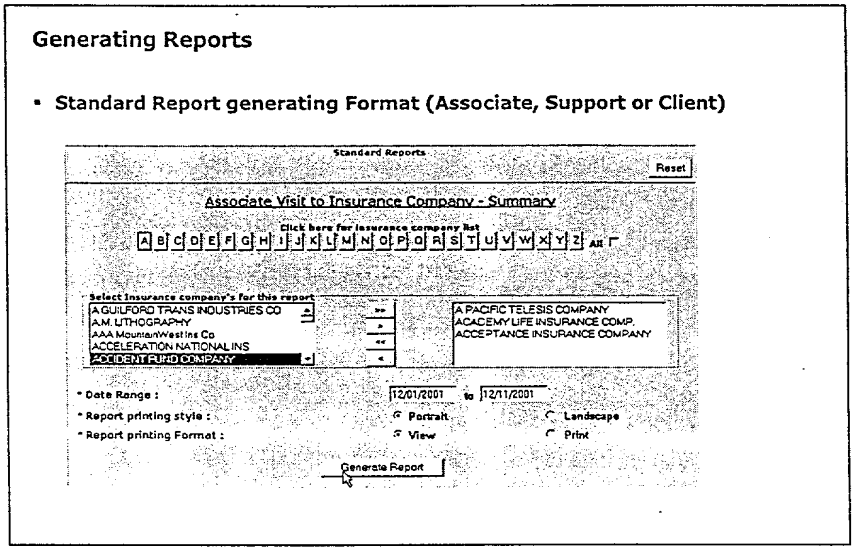

Generating Reports
• Standard Report generating Format (Associate, Support or Client)
Standard Reports
Reset
Associate Visit to Insurance Company - Summary
Click here for insurance company list
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Select Insurance company's for this report
A GUILFORD TRANS INDUSTRIES CO
A.M. LITHOGRAPHY
AAA MountainWest Ins Co
ACCELERATION NATIONAL INS
ACCIDENT FUND COMPANY
A PACIFIC TELESIS COMPANY
ACADEMY LIFE INSURANCE COMP.
ACCEPTANCE INSURANCE COMPANY
* Date Range :
12/01/2001 to 12/11/2001
* Report printing style :
Portrait
Landscape
* Report printing Format :
View
Print
Generate Report

FIG 58

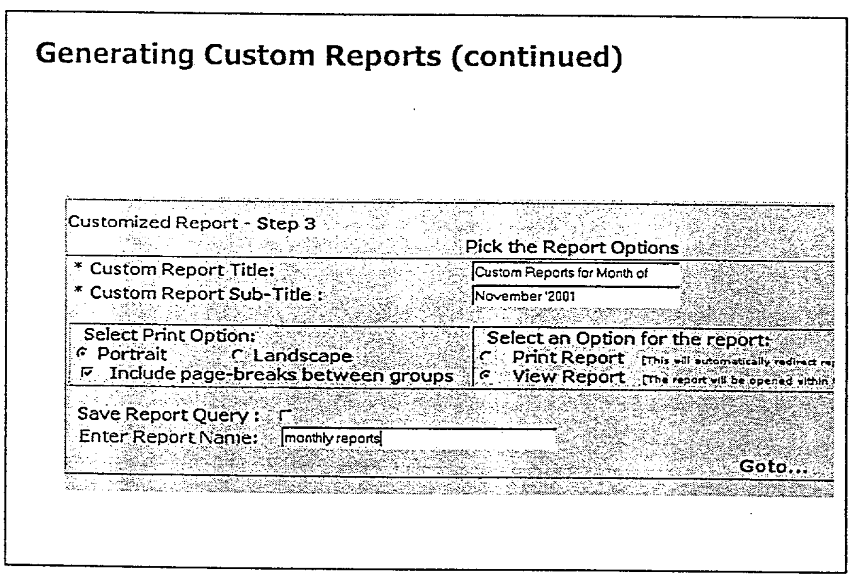

Generating Custom Reports (continued)
Customized Report - Step 3
Pick the Report Options
* Custom Report Title:
Custom Reports for Month of
* Custom Report Sub-Title :
November '2001
Select Print Option:
Portrait
Landscape
Include page-breaks between groups
Select an Option for the report:
Print Report
View Report
Save Report Query :
Enter Report Name:
monthly reports
Goto...

FIG 61